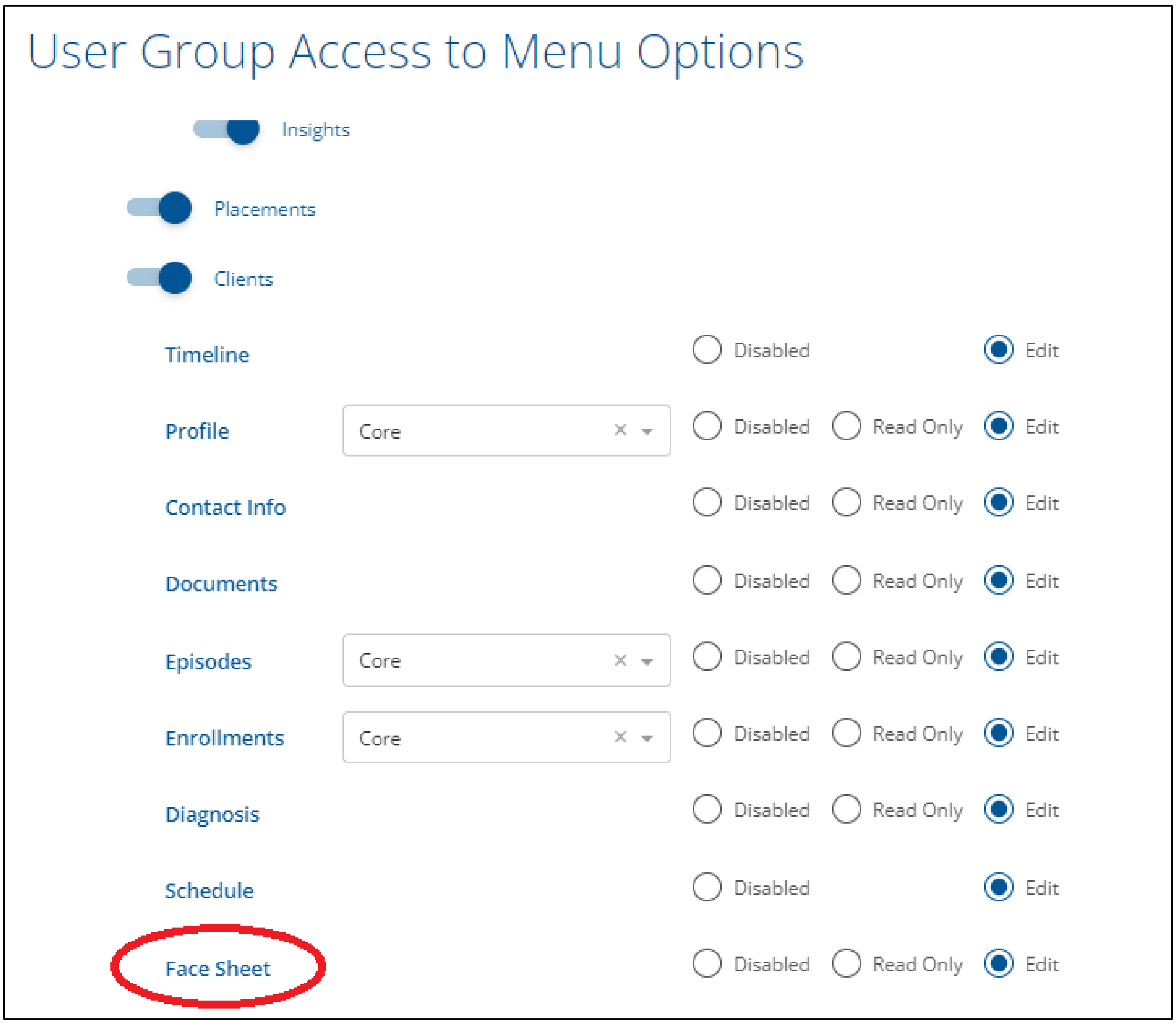
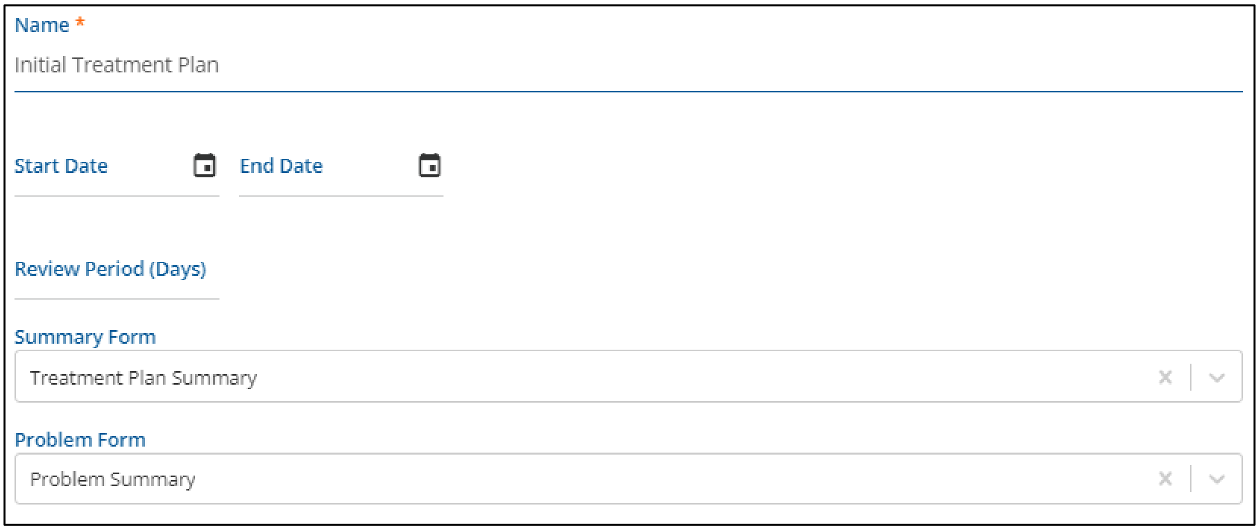
Treatment Planning System Preparation

In preparation for configurating the Treatment Planning System, the following set up can be reviewed.

1) Must have development turn on the Face Sheet so it appears and can be added to User Group Menu.

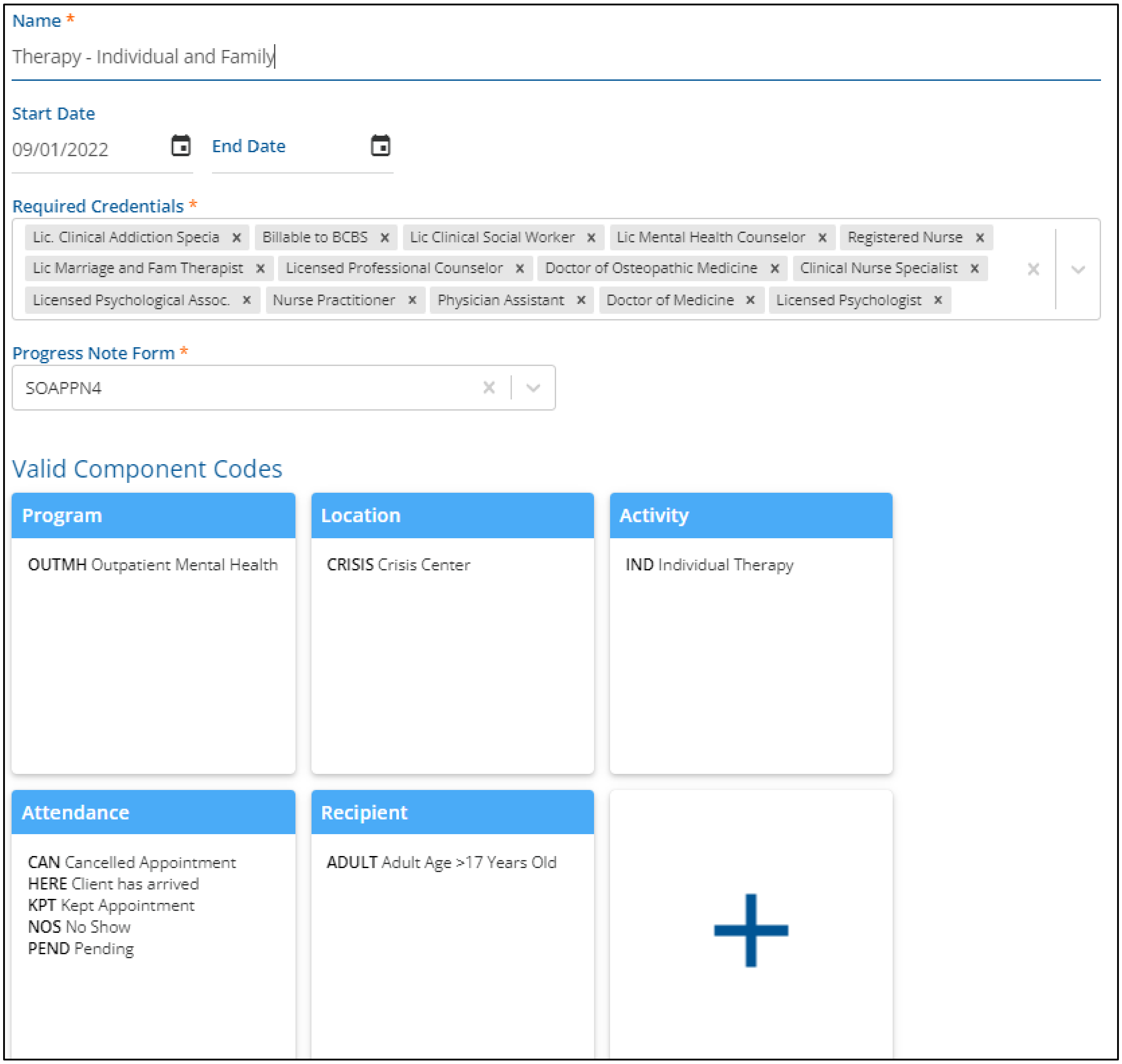


2) List the treatment plans needed and their associated forms.
   a. Separate treatment plans will be needed if they require different review periods, different forms/fields, different permissions for access.
   b. A FDNext form will need to be created or moved to EchoVantage in order configure the fields to be used as a summary for each treatment plan type.
   c. A FDNext form will need to be created or moved to EchoVantage in order configure the fields to be used as a summary for each problem on each treatment plan type.



3) List the assessments being used for treatment planning.
   a. Make sure Form DesignEHR form is available for these and has “assessment” checked on the form so it appears in the Assessment configuration drop-down.
   b. Consider whether you want to control which clients can receive each assessment. If so a view will need to be created for the Assessment Filter View.

4) What types of services are they providing?
   a. **Interventions** (e.g., individual therapy, group therapy) can be combined as long as they use the same credentials for billing, the same service components, and the same Progress Note form.
   b. What progress note goes along with each service



Name *

Therapy - Individual and Family

Start Date

09/01/2022

End Date

Required Credentials *

Lic. Clinical Addiction Specia × Billable to BCBS × Lic Clinical Social Worker × Lic Mental Health Counselor × Registered Nurse × Lic Marriage and Fam Therapist × Licensed Professional Counselor × Doctor of Osteopathic Medicine × Clinical Nurse Specialist × Licensed Psychological Assoc. × Nurse Practitioner × Physician Assistant × Doctor of Medicine × Licensed Psychologist ×

Progress Note Form *

SOAPPN4

Valid Component Codes

Program

OUTMH Outpatient Mental Health

Location

CRISIS Crisis Center

Activity

IND Individual Therapy

Attendance

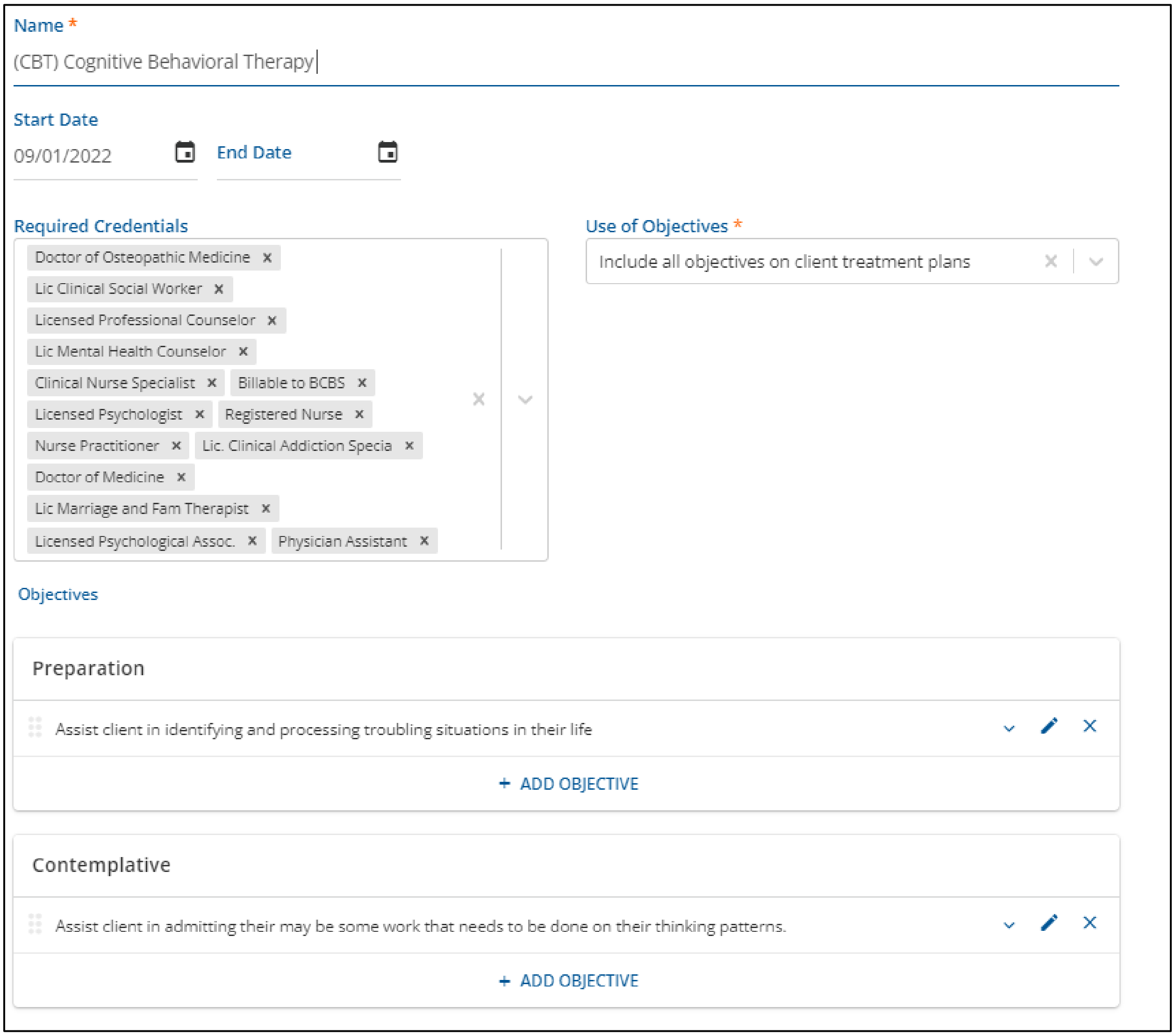
CAN Cancelled Appointment
HERE Client has arrived
KPT Kept Appointment
NOS No Show
PEND Pending

Recipient

ADULT Adult Age >17 Years Old

+

5) What types of treatment are they providing?
   a. **Treatment Methods** (e.g., CBT) can be generic if no evidence-based practices are being used.



6) What stages of change will they want to use?
   a. **Stages of change** are used to categorize Objectives and Milestones. They can be generic (e.g., one stage of change called "Active") if the agency doesn't want to use this categorization.
7) List of objectives and milestones for each Stage of Change.

<u>Additional Considerations</u>

- Agencies might want to set up automated tasks. These currently must be configured through views.
- Agencies may want a SSRS report associated with each treatment plan type.